Telescope 2030

Results of the survey conducted with a
panel of French CSOs in March 2022
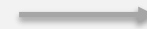
KAYROS
Inventer les solidarités de demain

COORDINATION SUD
RASSEMBLER & AGIR
POUR LA SOLIDARITÉ INTERNATIONALE

AFD

➔ The panel is **61%** composed of **"individual" organizations**, i.e. not linked to others in a statutory manner. (Presence of 5 networks in the panel).

➔ The panel includes :
- **13 ''small'' organisations** (less than 10 M)
- **10 ''large'' organisations** (more than 10 M)

→ We have highlighted a "small" vs "large" cross-sort throughout this report (to be found in green textboxes)

➔ On average, panel members are active in **6 sectors** and with **6 target groups**

Most represented sectors

Building and strengthening local capacity	**74%**
Human rights, gender	**65%**
Poverty, essential services for vulnerable groups	**52%**
Heath, disability, hygiene, nutrition	**48%**
Education, training, cultural activities	**48%**
Etc.	

Most frequent target groups

Associations, local NGOs, community groups	**70%**
Vulnerable people	**61%**
Youth	**65%**
Women	**57%**
Public authorities / decision makers	**57%**
Etc.	

"Large" organizations are, on average, active in 8 sectors.

"Small" organizations are active in 4 sectors.

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Many panel members are initiating foresight projects to define their ambitions and positioning for the next 5-10 years.

« Defining a 2030 ambition and a 2025 strategic plan»

« We work on scenarios for the next 10 years before working on our associative project »

Close to 40% of the organizations in the panel believe that they will have to change their missions in the coming years to maintain their relevance:

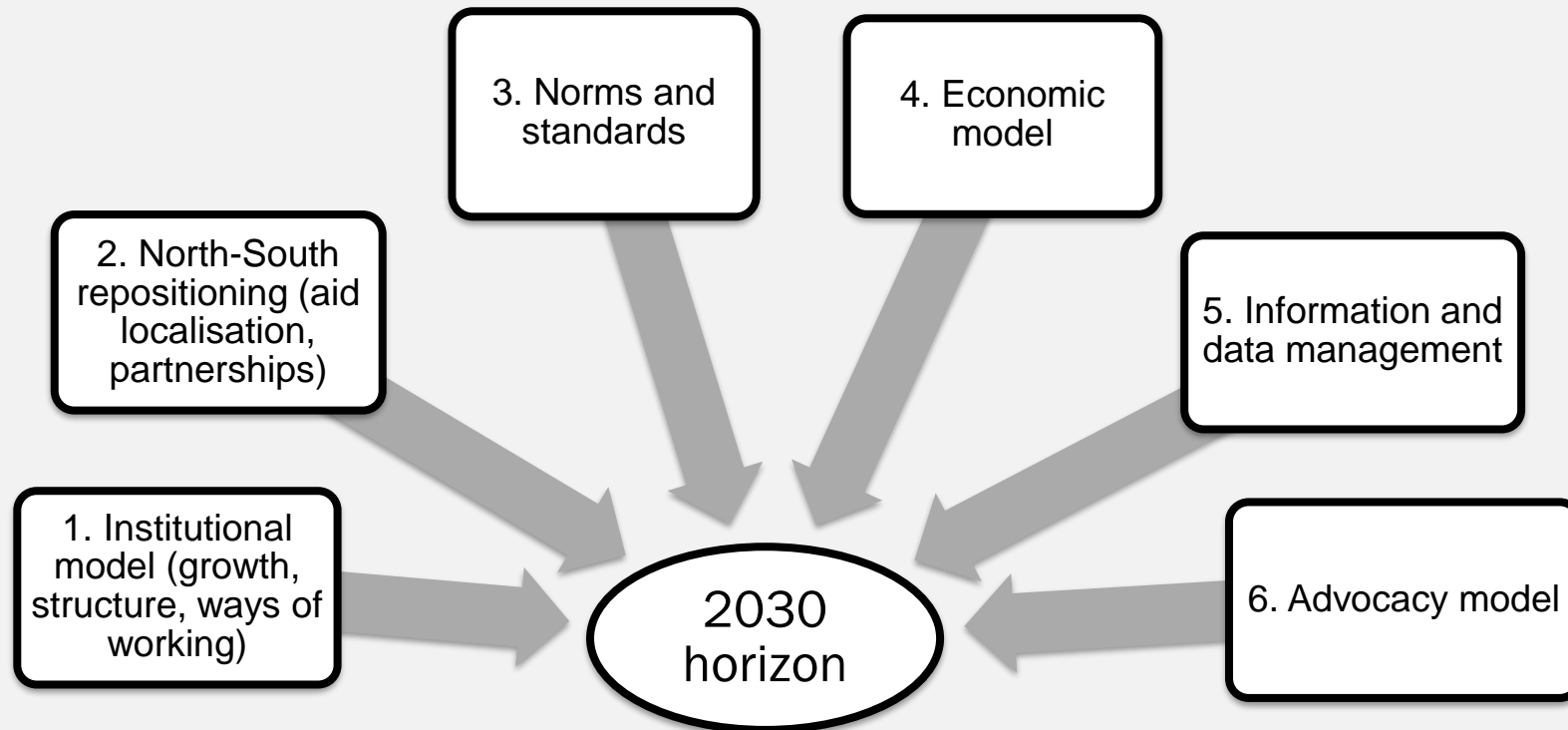**To integrate new themes,** broaden their missions, their targets, etc.

« Support and care to new population groups living in the street »

« Addition of a theme on youth integration »

To adapt to the changing political, environmental, social and economic contexts.

86% believe that in 10 years, they will evolve into more restricted and constrained contexts, in a large number of countries.

Some key results
on the 6 themes of the survey

3. Norms and standards

4. Economic model

2. North-South repositioning (aid localisation, partnerships)

5. Information and data management

1. Institutional model (growth, structure, ways of working)

2030 horizon

6. Advocacy model

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THEME 1
Evolution of the institutional model

Our prospective hypothesis

The main hypothesis is that some INGOs would change scale in response to the growing demand for "critical size" projects (higher and higher funding thresholds, increasingly heavy procedures requirements, etc.).

To achieve this change of scale, one of the ways would be the progression of group logics: rapprochement, mutualization, and mergers to meet this demand for massification.

61% **of the organizations on the panel were growing** over the past three years, both in terms of their budget and their team.

> It was mostly the "large" organizations that were growing.
>
> 23% of "small" organizations have seen their budgets decrease over the past three years.

45 % **of the panel members expect to grow in the coming years.**

> "Large" organizations in particular plan to grow in the coming years, especially when it comes to their teams.

SEVERAL GROWTH DRIVERS IDENTIFIED

- Scaling up proven concepts
- Larger and larger projects
- Strengthening of teams to ensure risk coverage
- Diversification of funding sources
- Projects' innovations
- New, less expensive intervention models

INSIGHTFUL QUOTE

"The growth of the teams will be based on: the needs generated by the past growth of activities (...) the increasing complexity of operational contexts (...) the expectations of institutional donors regarding risk coverage (...) the need to invest in areas of innovation (...) and in strengthening the commitment of the public in France."

COLLECTIVE DYNAMICS, NETWORKS, POOLING OF RESOURCES AND FUNCTIONS

70% Will be making significant changes to their governance in the coming years

Among the governance changes mentioned, several ambitions emerge:

— Adapting governance to strategic issues
— Move towards a transnational network / Internationalize governance
— Build a multi-stakeholder governance that associates private companies and associations
— Animate networks interested in exchange and cross capitalization

39% Will pool functions

Will set up affiliates or branches

Insightful quote

"We have pooled humanitarian logistics and fundraising activities, allowing us to complement our fields of expertise and to access additional resources and action opportunities".

Where "large" organizations are accelerating pooling, "small" ones are focusing on setting up branches or affiliates to expand.

On the other hand :
A less massive interest for merger, integration in a network, creation of subsidiaries, etc.
(despite several examples of these transformations within the panel).

96% | **Have changed their work organization.** The pandemic and the inevitability of online working have accelerated a transformation that will continue, but less actively.

Have sought to increase their attractiveness.

Attractiveness will be an issue in the years to come, especially since the growth of teams will result in a large part from risk management and compliance services being created or reinforced. | **70%**

+ 50% | More than half of the organizations will seek in the next few years both to strengthen their headquarters and to decentralize (transferring functions and/or teams to the South).

The "large" organizations on the panel are the ones that are most clearly focusing on both directions at the same time.

Fewer of the "small" organizations are planning to strengthen their headquarters. It seems to be less often in their model.

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THEME 2
North-South repositioning : the evolution of partnerships and the link to local actors

Our prospective hypothesis

The main hypothesis was the transition from a logic of "international solidarity" (still marked by a top-down North-South dynamic) to a logic of "global solidarity".

This transition would be illustrated in particular by an evolution in partnerships, in the respective roles of actors and in the distribution of the funding, which is summarized today by the term "localization".

EVOLUTION OF PARTNERSHIPS WITH LOCAL ACTORS

The theme of "partnership transformation" has been central in recent years and will remain so in the years to come.

This is the transformation noted as the most important by a large proportion of respondents, particularly "large" INGOs.

In recent years, the vast majority of respondents already indicate changes in posture:

- Towards a greater role of **REDISTRIBUTOR** of funds and guarantor of local partners **(90 %)**

- Towards a greater role of network **ANIMATOR** with local partners **(81%)**

- Towards a greater role of **CO-PRODUCTION OF EXPERTISE (86 %)**

Respondents believe that these changes will continue and strengthen in the coming years

For the coming years, respondents anticipate that localization will also progress regarding :

- Greater responsibility taken by local actors regarding **STRATEGIC DECISIONS (86 %)**

- **A RESTRUCTURING** of partnerships: for **half** of the respondents (but **70 %** of the « large » organisations)

- A growing role as a **SERVICE SUPPLIER** for local actors **(43%)**

EVOLUTION OF PARTNERSHIPS WITH LOCAL ACTORS

INSIGHTFUL QUOTES

Verbatims highlight the tensions and risks that accompany the ambition to localize aid.

→ **Need for instruments that accompany localization, facilitate 'collaborative working' and recognize complementarities**

« Funding tools continue to separate what is done 'over there' and what is done 'over here'. »

« More horizontal approaches (...) require time, and projects do not provide the timeframe to build relationships. »

→ **Financial / fiduciary risks to be considered**

« There is a fiduciary risk when funding is channeled through us. »

« Funders need to bear part of the risk without the lead partner being the guarantor for all the partners »

→ **Need for a localization approach based on complementarity**

« There is a risk of a loss of legitimacy of actors from the North to act in the South »

« Need for an affirmation of a 'localization' that is not necessarily contradictory with field and proximity action, vision of a mutual contribution between partners with complementary expertise / knowledge »

THEME 3
Evolution of norms and standards shaping interventions

Our prospective hypothesis

The main assumption was that an increasingly complex international normative framework would constrain the modalities of INGOs action (e.g.: reduction of the carbon footprint; control of the financing of terrorism and money laundering; intersectional approach to vulnerabilities; etc.).

These new issues, which are very diverse in nature, could become increasingly essential in the financing and procedures of public and private donors. The movement could therefore be that of a stronger integration of these issues in interventions and a growing complexity of their perimeter.

EVOLUTION OF NORMS AND STANDARDS
AND THEIR IMPACT ON INTERVENTION FRAMEWORKS

Some standards have already been well integrated by INGOs over the last few years (mainstreaming) and are expected to still be major topics in the coming years

95% have developed a strategy/policy/charter regarding **gender and the fight against gender-based and sexual violence.**

62% have developed a strategy/policy/charter regarding **the fight against the financing of terrorism and money laundering**

Other issues are growing, and an increasing number of INGOS are planning to integrate them in the coming years

43% ↗ 76% **Strong evolution concerning environmental standards.** Their integration into strategies or other guiding documents will increase by more than 30% in the coming years.

52% ↗ 71% **Strong evolution concerning the "do no harm" approach,** and the protection of partners and beneficiaries. Their integration into strategies or other guiding documents will increase by almost 20% in the coming years.

INSIGHTFUL QUOTES

INGOs promote most of these standards.

They generally distinguish between standards that reflect the values they hold (gender, environment, do no harm, etc.) and standards that are externally imposed (e.g., counterterrorism).

« Apart from the fight against the financing of terrorism and money laundering, which is a constraint imposed by certain donors (...), all the other issues are strongly linked to our feminist positioning. (...)

These reflections have an important impact on the organizational and institutional changes that we wish to carry out. »

Several INGOs also point to the potential impact of standards inflation on flexibility and access.

« The normative framework is evolving towards increasing constraints, which entail major risks for our ability to access, respect humanitarian principles and in particular our ability to deliver impartial aid. »

THEME 4
Evolution of INGOs economic model

Our prospective hypothesis

The main hypothesis was that INGOS sources of funding will diversify, particularly with the rise in funding from private actors and a series of new types of donations (friend-raising, micro-donations, free donations, etc.).

This diversification would challenge the standards of the traditional "club of funders" mainly composed of public donors; and place new demands on INGOS (in terms of demonstrating direct impact, orienting projects on certain topics, increasing the critical size of projects, etc.).

PUBLIC/PRIVATE FUNDING BALANCE

The majority of the organizations on the panel have an economic model based on public funds.

57% of the organizations in the panel have more than 60% public funding.

14 % of organizations have a majority of private funds
(and no "small" organization is in this case).

The rest of organizations balances private and public funds (both between 40% and 60%).

NATIONAL / INTERNATIONAL FUNDING BALANCE

The panel is divided into 3 quasi-equal groups with regard to the national/international origin of funding.

Majority of national funding
(60% and more) **38%**

Majority of international funding
(60% and more) **33%**

Balance between national and international funding
(both between 40 and 60%) **29%**

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INGOs identify several sources of funding that should become more important in their business models.

76% are focusing on the development of funding from foundations (private foundations, corporate foundations, endowment funds).

62% focus on the development of member and citizen funding (including fundraising).

48% are banking on the development of direct financial sponsorship by companies.

In contrast, few INGOs foresee an evolution of:

The share of funding from market activities **19%**

The share of funding from crowdfunding, micro-donations and/or payroll donations **24%**

And few INGOs believe in a significant development of DIBs

NEW SOURCES OF FINANCING

INSIGHTFUL QUOTES

Verbatims underline the desire of many INGOs to strengthen their capacity to mobilize private funds, in all their diversity

« Fundraising from the general public and our individual donors remains a key area for our independence and ability to maneuver. (...) Strengthening our digital presence, innovating to reach new audiences and new forms of mobilization is also an important avenue. »

« Private foundations are a new field, and a fundraiser was hired in 2021 specifically for this. With corporations, we are open and cautious at the same time. »

« Concerning citizens and companies, the tendency to withdraw into oneself could make it difficult to find funds. On the other hand, the international context could make causes less attractive ».

« The post-Covid budget cuts and the cost and consequences of the war in Ukraine make me fear drastic cuts as early as 2023 in the international solidarity sector...this will not transform our model but make it more complicated. »

INGOs share significant concerns about the changing funding environment

THEME 5
Information and data management

Our prospective hypothesis

The main hypothesis was that INGOs and donors will increasingly use "data" collected in a massive and systematic way : both "big data" (from connected equipment, information on banking transactions, satellite images, etc.), and "large data" (from mobile data collection, biometric census, cartographic crowdsourcing, etc.) will feed monitoring and evaluation systems.

These data could provide "real-time" information, in order to communicate differently on projects, but also to reinforce the agility of these projects and their capacity to adapt to the evolution of local situations. The challenge will be to produce, share and disseminate this data.

An almost unanimous will of INGOs to evolve regarding information management (IM).

95% **of responding INGOs want to implement digital solutions** in the next few years to improve information management (76% of them have already started this work in recent years)

76% **want to train teams** in new data collection and analysis techniques (62% have already done so)

71% **want to increase the resources** allocated to information management (62% have already committed to this)

With a greater emphasis on IM in "large" organizations.

The survey shows a risk of "small" organizations dropping out on this issue

INSIGHTFUL QUOTES

« We have created a MEAL position in 2022 (...) We will systematize data collection with KOBO, and standardize data quality (e.g., gender disaggregation) ».

« Recruitment of human resources dedicated to knowledge management, use of dedicated software, implementation of an e-learning platform. Towards the implementation of a collaborative platform for internal data management ».

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But still quite infrequent uses of large and big data until now (no type of data is used by more than 1/3 of NGOs)

Large/Big data usage
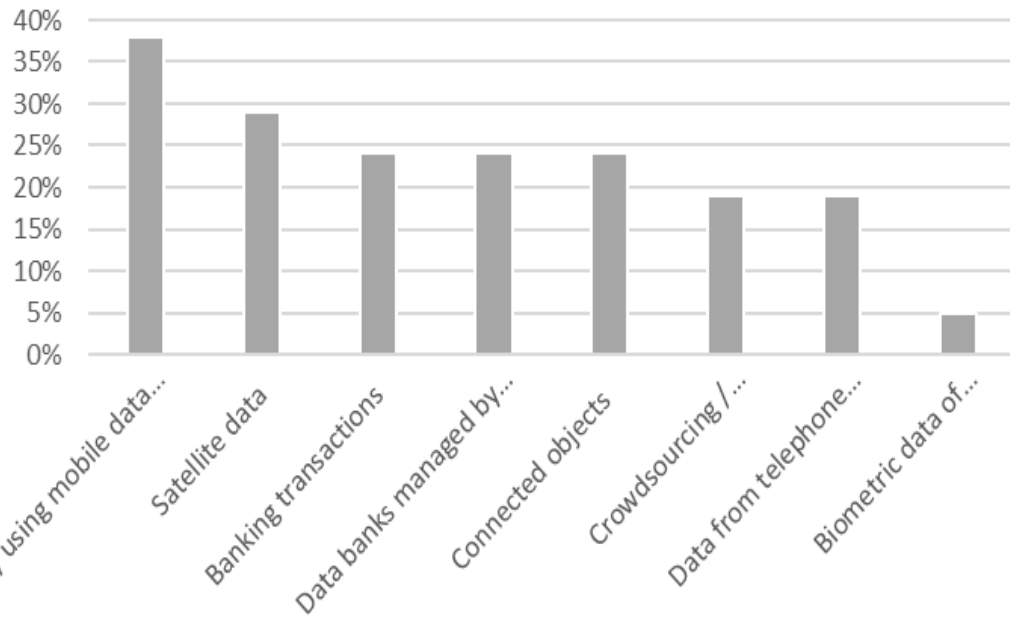
And an acute perception of the difficulties and risks associated with the new information management models

→ **A challenge of access and control:**

« Poor control of data by field teams, misinterpretation »

« Disengagement of stakeholders (project-level staff, partners) and accentuation of the digital divide »

→ **A security challenge :**

« Protection of beneficiaries'/users' biometric data: a complex subject on which INGOs must gain the ability to express their position and influence »

100% **of INGOs plan to increasingly take into consideration data security and protection**

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THEME 6
Evolution of the advocacy model

Our prospective hypothesis

The main hypothesis was that advocacy strategies of INGOs will evolve towards logics that are more collective, more digitalized, and more focused on "causes". This evolution would make it possible to respond to the growing movement of mobilization "from below", based on groups (notably digital) attentive to their autonomy and the availability of flexible tools to build campaigns.

Another hypothesis was that the advocacy repertoire will diversify, and that a radicalization of advocacy (strategies of judicialization or civil disobedience for example) will be observed.

3 ADVOCACY TRENDS that are expected to gain momentum in the coming years

INSIGHTFUL QUOTES

76% ↗ 86% | Mobilization of the media and the general public

76% ↗ 81% | Digitization of advocacy efforts

76% → 76% | Pooling of advocacy resources and participation in collective campaigns

« Today, we can no longer think of public mobilization and influence strategies outside of social networks, so strengthening this aspect is essential. »

«The change that has been initiated and will continue is a search for greater articulation between technical advocacy (policy co-construction) and social mobilization actions. »

Some INGOs also anticipate a change in the scale and targets in the coming years:

48% are considering a change in their advocacy targets

38% are considering a change in the scale of their advocacy work (especially "small" organizations)

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« The upheavals in the international regulatory system, which have already been evident for several years and are symbolized very visibly in the absolute blockage of the Security Council and the Ukrainian crisis, force us to change our advocacy targets ».

On the other hand, only a small percentage of INGOs plans to change their advocacy repertoire over the next few years

25% | will take on a watchdog function.

19% | are considering involvement in legal actions

14% | plan to become more radical in their advocacy

25% of the "small" organizations are considering a shift to more radical advocacy

INGOs also point to certain risks associated with their advocacy activities

Advocacy Capacity Risks

"There is a risk of losing our ability to do the long-term, substantive advocacy work that is the only way to achieve results and have real credibility".
"Not being able to fund our advocacy work over time".

Risks associated with advocacy messages

« Participating in processes that result in the institutionalization of certain approaches (feminist in particular), partly deactivates their transformative character ".
"Losing control of the messages BUT it is also essential in an acceptance of power reversal, so it is a very accepted risk ».

Some significant differences between "small" and "large" INGOs

GROWTH

Uneven growth prospects: it is mainly the "large" organizations that are planning for growth, especially in terms of team size.

70% | Of the "large" organizations plan to grow their team (compared to 31% for "small" organizations)

↳ "Large" organizations plan to strengthen both their headquarters and their decentralized entities.

↳ "Small" ones are moving more towards a stable headquarters model, and strengthening through affiliates or secondary offices,

PARTNERSHIPS

Most organizations are considering engaging in aid localization, but :

More "large" organizations are anticipating significant changes in this area in the coming years.

→ While "small" organizations have already changed in recent years in this area.

"Large" organizations will focus on fewer partners and strengthen their partnerships with them

→ For « large » organisations, it's time to choose the most strategic and effective partnerships

78% | of "large" organizations will strengthen their partnerships with fewer partners (compared to 25% of "small" ones).

INFORMATION MANAGEMENT

"Large" organizations will be more active in the area of information management.

→ They are more convinced by more radical developments such as real-time project management.

→ They are already using new tools more frequently. There is a risk that "small" organizations will be left behind in this area of information management.

17% of "small" organizations have already conducted cell phone surveys (versus 67% of "large" organizations).

ADVOCACY MODEL

"Small" organizations will be active in advocacy and transform their ways of working.

→ In particular, they will seek to strengthen their advocacy carried out within collectives.

→ Many will also change the scale and targets of their advocacy.

58% of "small" organizations want to change the scale of their advocacy, compared to 11% of "large" organizations.

CONVERGENCES

between "small" and "large" organizations. Both are :

- Convinced that interventions will take place in more constrained and restricted contexts for many countries.

- Convinced that INGOs advocacy will be conducted primarily through networks or alliances.

- Not convinced that advocacy will have to become more radical for INGOs to maintain the capacity to influence public policy.

- Not convinced that the International Solidarity /AID sector will merge with other sectors.

- Not convinced that, in 10 years, INGOs will have a near-zero environmental footprint and carbon impact.

DIVERGENCES

between "small" and "large" organizations

Many of the "small" organizations:
- Do not want a two-speed sector, with small, localized or specialized structures on one side and large, international, multi-themes structures on the other side.
- Imagine that there will be more flexibility regarding the statutes, mandates and territories of the sector's actors.
- Have difficulty imagining themselves going digital (for information management or advocacy).

Many of the "large" organizations:
- Believe that in 2030 there will be essentially two main types of INGOs: large, multinational structures, and small localized/specialized structures.
- Do not believe that the model of the INGO playing a primary redistributive role for local actors.will prevail
- Do not believe that the primary focus of the sector will be crisis response.

SYNTHESIS
The main trends INGOs believe will drive change by 2030

- **Links to local partners and North-South positioning**

- **Standards that frame interventions**

- **Economic models**

are seen as **the 3 most important areas of transformation** for the sector in the coming years.

« Large » organisations envision that the change dynamic will be more intense than « small » organisations.
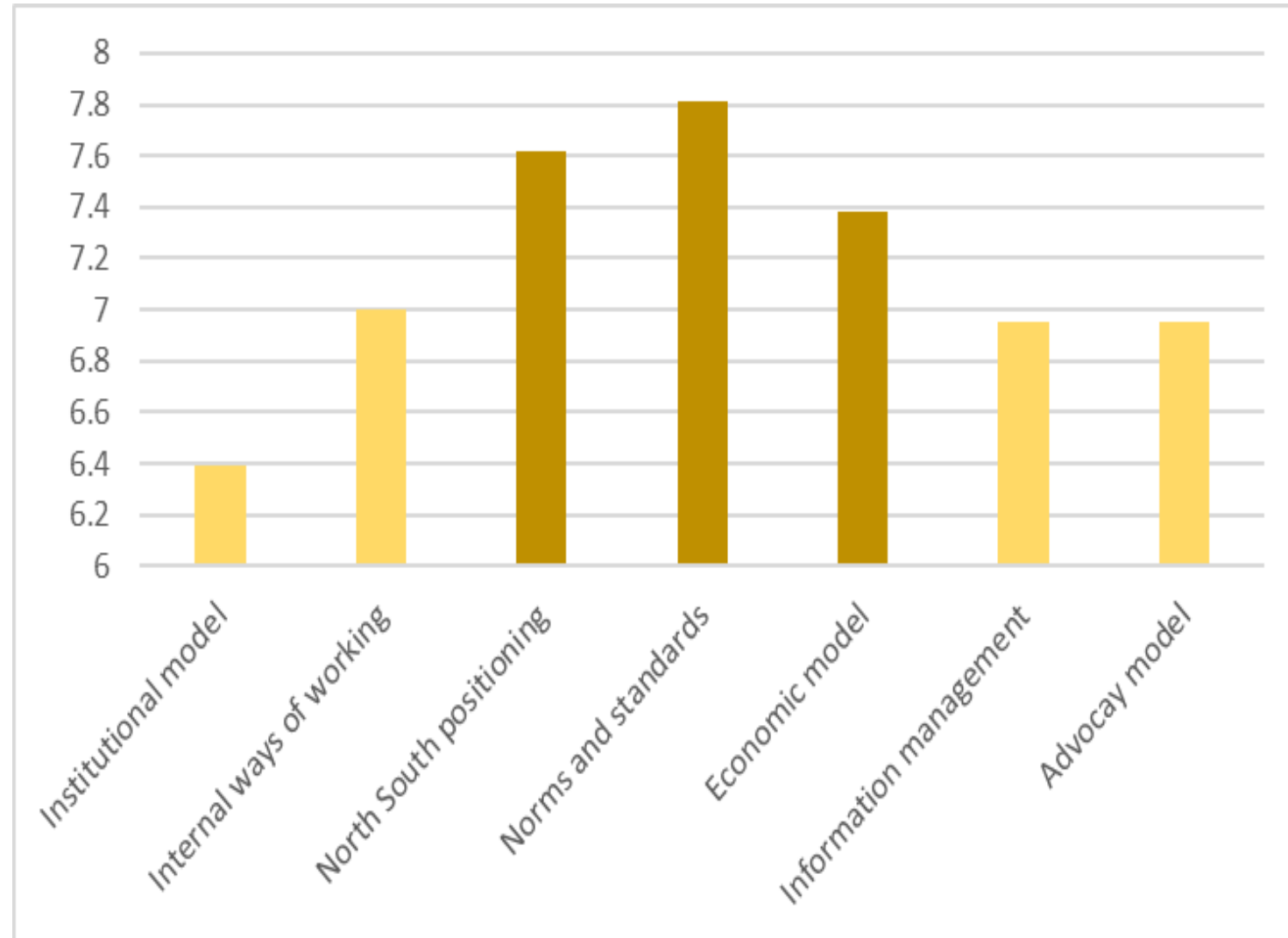
Among the 64 trends surveyed, **24 trends** are prioritized by INGOs (70% of organizations will be transforming themselves in these areas)

And among them, **9** 🚩 **trends** are perceived as particularly central: (between 33% and 50% of organizations will be "actively" transforming themselves in these areas)

Standards and Norms
- 1 / Gender. Fight against gender-based and sexual violence 🚩
- 2 / Governance, transparency, accountability
- 3 / Intersectional approach. Inclusion of minorities. Diversity 🚩
- 4 / Environmental footprint, carbon footprint 🚩
- 5 / Do no harm; protection of partners and beneficiaries (safeguarding and whistleblower)

North-South positioning. Aid localization
- 6/ Network or consortium facilitator including local partners 🚩
- 7/ Strengthening your local partners 🚩
- 8/ Greater strategic decision power of your local partners 🚩
- 9/ Co-production of expertise, think tank 🚩
- 10/ Highlighting your local partners to increase their visibility and direct access to funding 🚩
- 11/ Redistributor of funds and/or guarantor for local partners

Economic model
- 12/ Funding from private foundations, corporate foundations, trusts, endowments

Ointernal organisation Ways of working
- 13/ Implementation of more flexible ways of working (e.g.: online working)
- 14/ Greater emphasis on risk management and compliance 🚩
- 15/ Modification of working conditions to increase attractiveness to actual and potential employees

Information and data management
- 16/ Increased consideration of security and data protection issues
- 17/ Implementation of digital solutions to improve information management
- 18/ Use of new types of data for managing, learning or accountability
- 19/ Training of teams in new data collection / analysis techniques
- 20/ Growth in financial resources allocated to information management

Advocacy
- 21/ More engagement with the media and the general public
- 22/ Digitalization of advocacy strategy (social media, online mobilization, etc.)
- 23/ Pooling of advocacy resources and participation in collective campaigns

Institutional model
- 24/ Significant change in governance

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